# User Manual

## For

# FinXpert

**Version <1.0>**

**Prepared by**


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- **Date: 05/04/2025**

# Contents

# 1 Overview

## 1.1 Purpose:

The purpose of this manual is to guide users through the various features and functions of the FinXpert application, including expense tracking, income management, and AI-driven financial insights.

## 1.2 Product Scope:

FinXpert is a financial management tool designed to track both expenses and income. It uses AI integration to offer personalized financial insights, manage spending, and analyze financial behavior based on cognitive triggers and categories.

## 1.3 Intended Audience:

This manual is intended for all users who wish to track their financial activities, including expenses and income, and gain insights into their financial behavior through AI-powered analytics.

## 1.4 Software Requirements:

The application runs on any modern web browser with the ability to display interactive charts and analytics. It supports both desktop and mobile web versions.

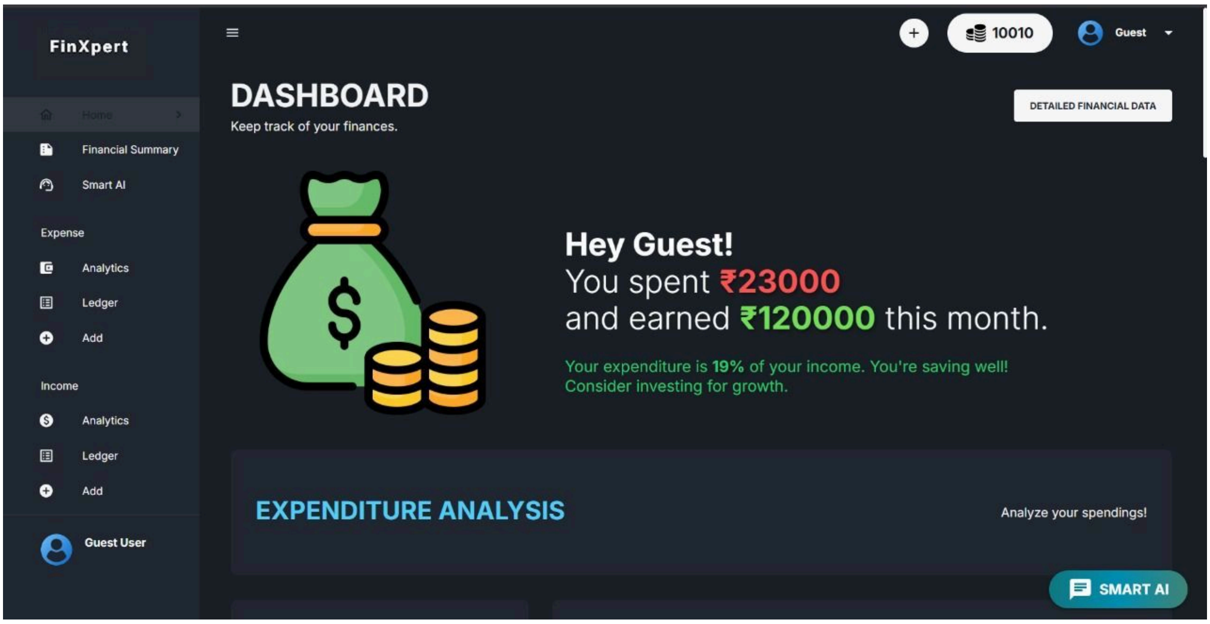
# 2 Guide for Users

## 2.1 Dashboard

Upon logging in, users are presented with a Dashboard showcasing their financial activity. The dashboard gives a quick summary of the user's spending and earnings for the current month.

**Key Features:**

- View total spent and earned amounts.
- Access detailed financial data and summaries.
- AI-driven expenditure analysis with recommendations.




## 2.2 Financial Summary

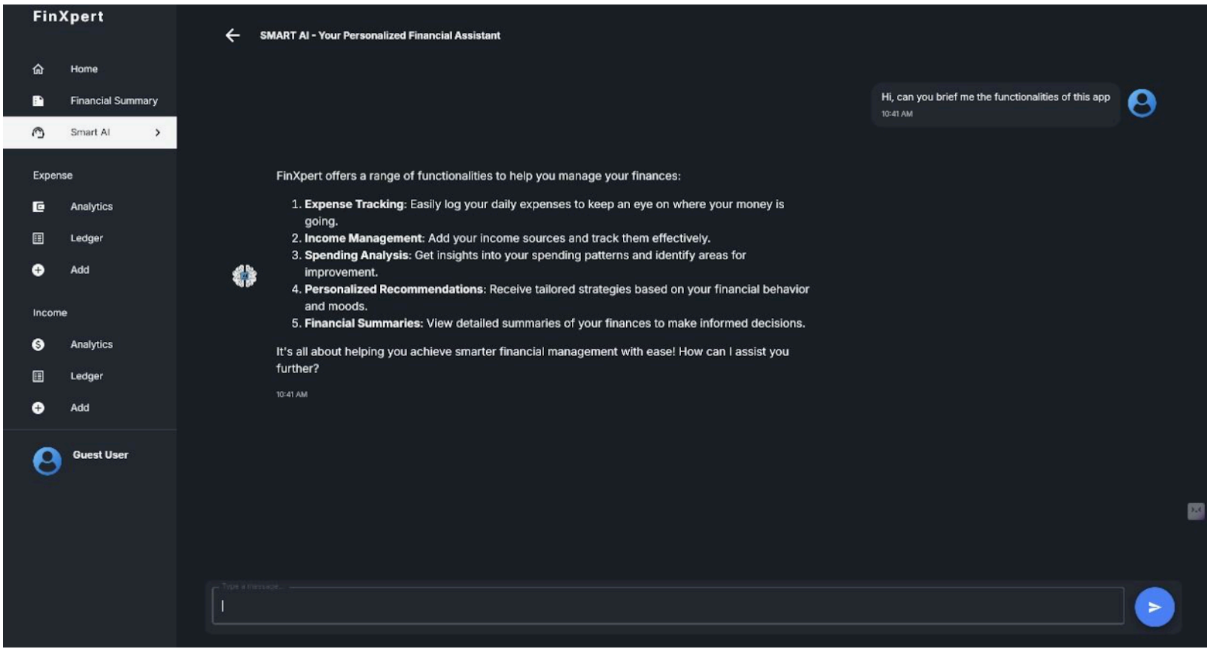
In the Financial Summary section, users can analyze their monthly expenses and income data visually. The AI-driven insights help in identifying patterns and areas for improvement in spending behavior.

## 2.3 Smart AI

The Smart AI feature provides personalized financial recommendations based on the user's financial behavior. It helps optimize spending habits and gives advice on saving and investing.

**Key Features:**

- Ask the AI about spending habits, budgeting advice, and recommendations.
- Receive tailored strategies for financial growth and savings.

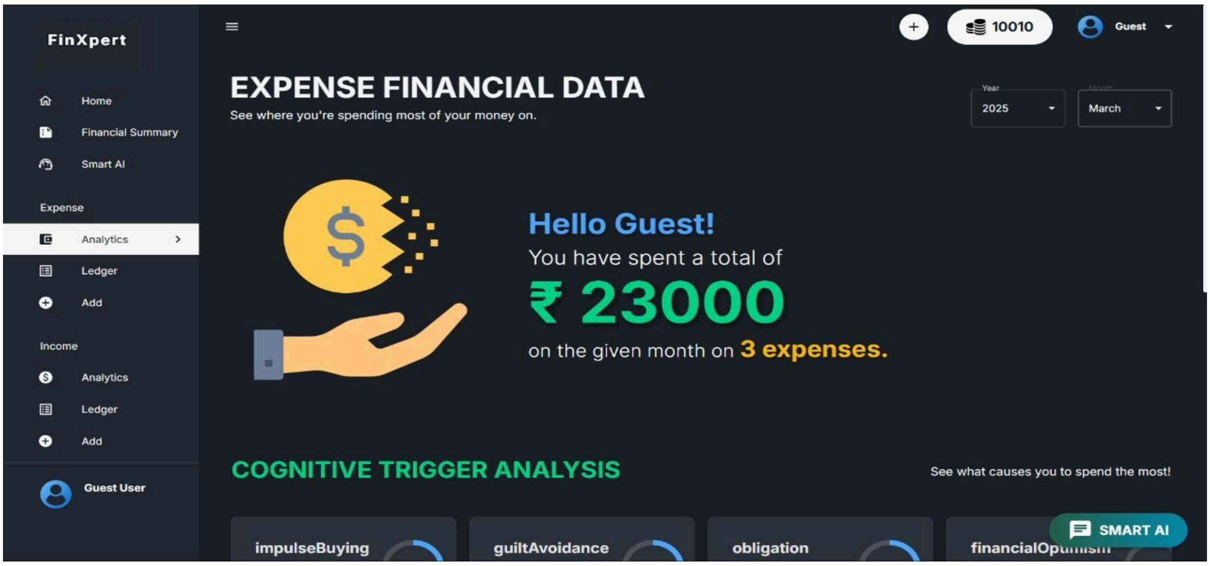


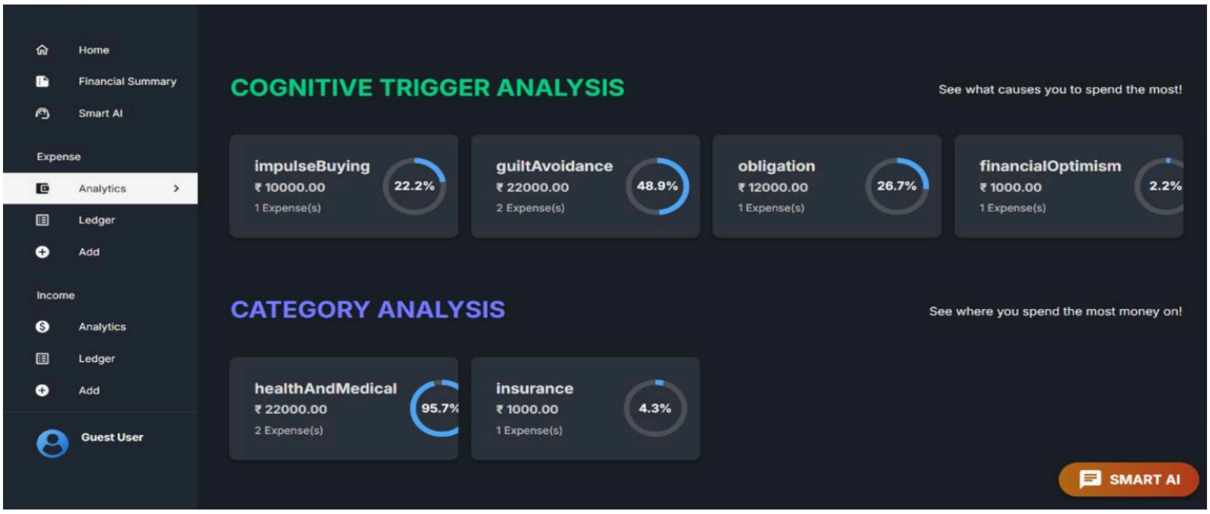

## 2.4 Expense Analytics

The Expense Analytics section provides an in-depth analysis of spending patterns based on categories and cognitive triggers. The data helps users understand where most of their money is spent and how they feel about their purchases.

**Key Features:**

- Visual representation of spending by category.
- Cognitive trigger analysis to see which emotional triggers influence spending.
- Mood analysis to track how the user feels after spending.



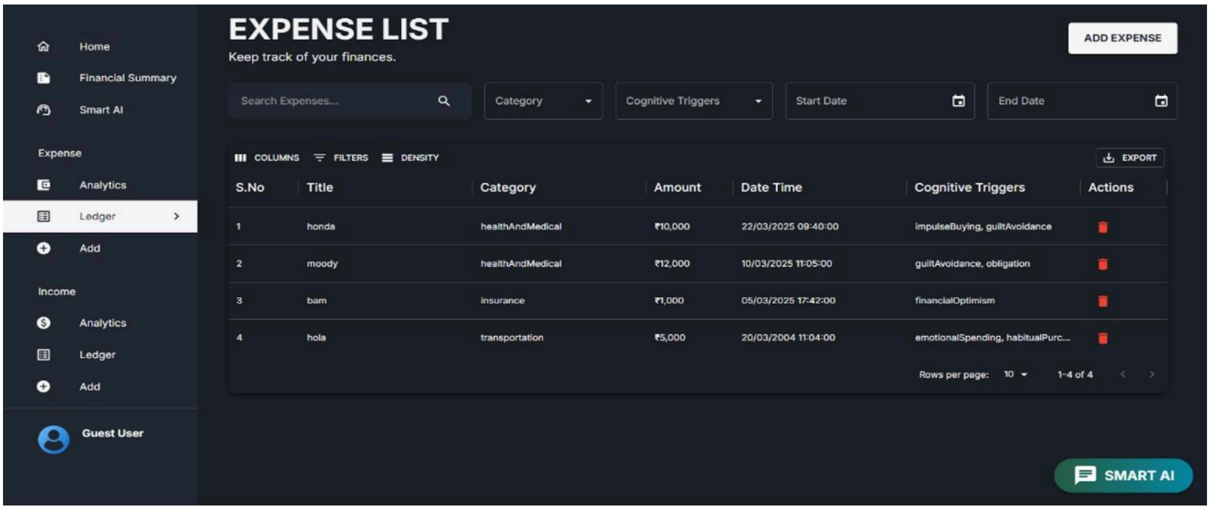




## 2.5 Expense Ledger

The Expense List displays all recorded expenses. Users can filter expenses by category, cognitive triggers, and date range.

**Key Features:**

- Add new expenses.
- View details of each expense, including the title, category, and amount spent.
- Export the list for reporting purposes.

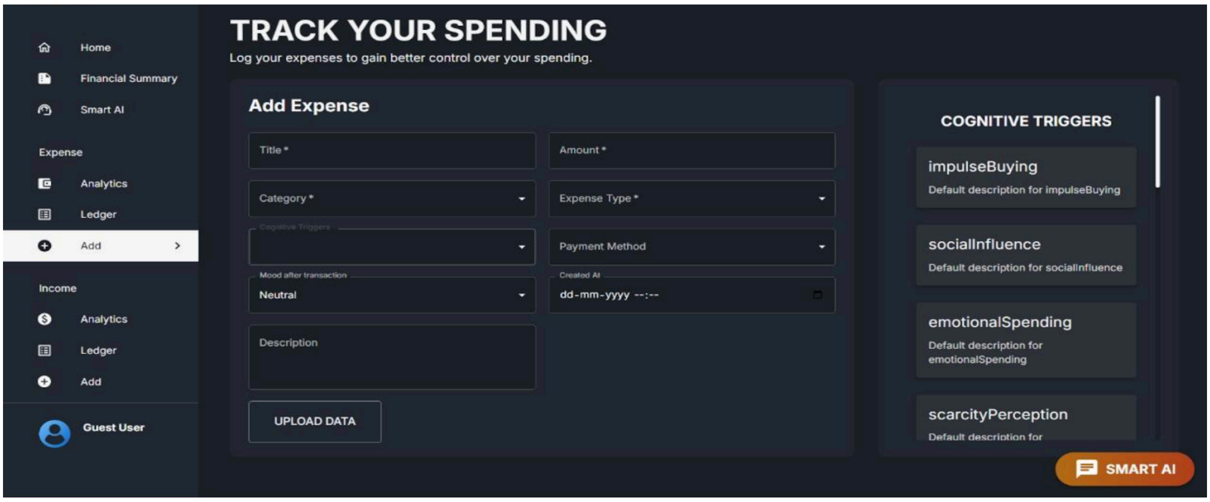



## 2.6 Adding Expenses

Users can manually add expenses through the Add Expense form, which allows input of the expense title, category, amount, and payment method.

**Key Features:**

- Select from predefined cognitive triggers to categorize the expense.
- Attach a description for each expense.
- Record the date and time of the transaction.

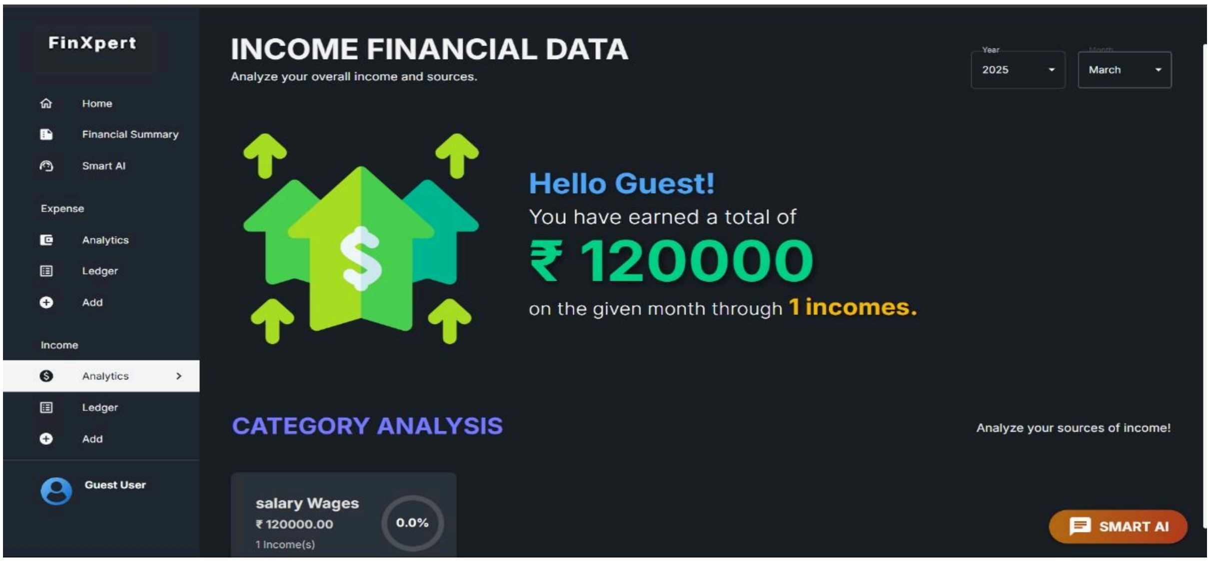



## 2.7 Income Analytics

Income Analytics allows users to analyze their income patterns across different categories and visualize overall financial health.

**Key Features:**

- Overview of total income earned during a selected period.
- Income analysis by category.
- Breakdown of income sources to help with budgeting.

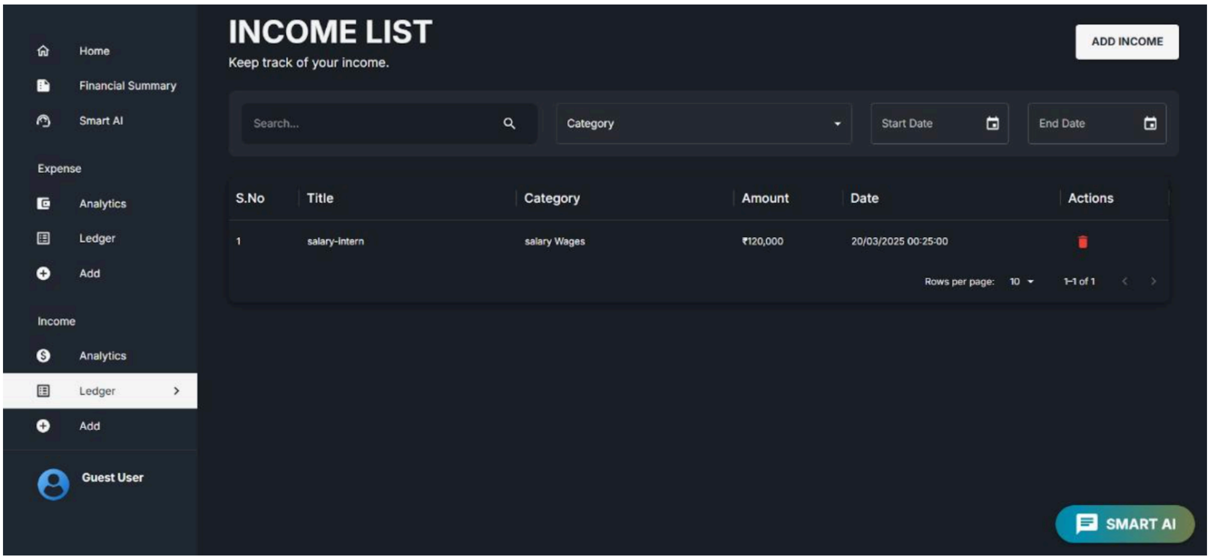



## 2.8 Income Ledger

The Income List shows all recorded income sources, including salary, freelance earnings, etc.

**Key Features:**

- Add income sources and track earnings.
- Categorize income sources for detailed financial analysis.
- View income breakdown by category.

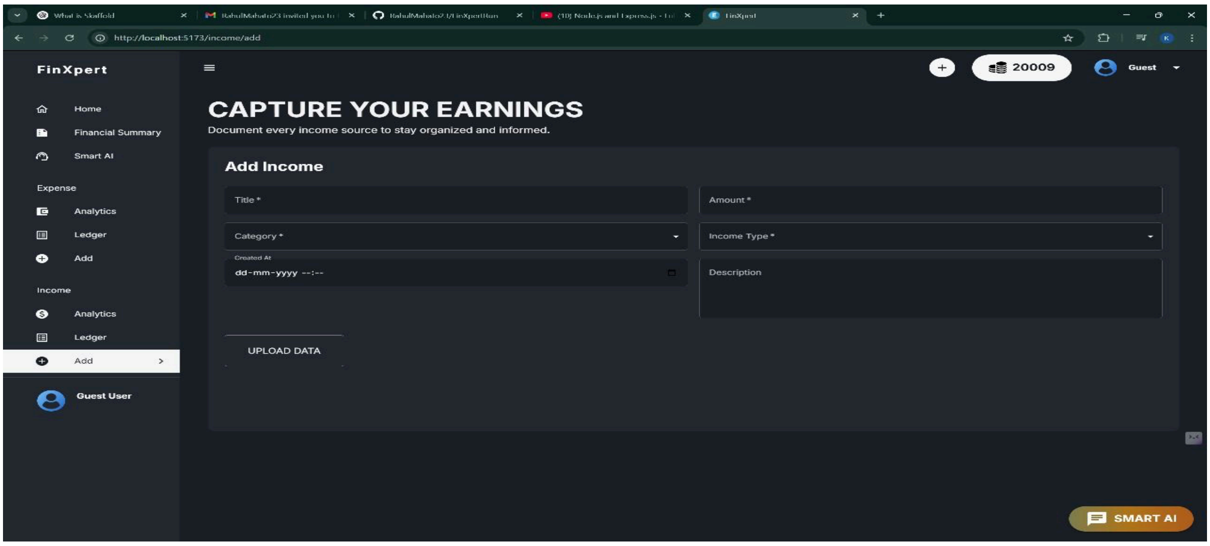


## 2.9 Adding Income

Users can manually add income sources using the **Add Income** form, which captures essential details about the income.

**Key Features:**

- **Title**: Name the income source.
- **Category**: Select the income category.
- **Amount**: Enter the income amount.
- **Income Type**: Choose the income type (e.g., wages, gift).
- **Created At**: Set the date and time.
- **Description**: Optionally add a description.
- **Upload Data**: Optionally upload supporting documents.



# 3 Troubleshooting

## 3.1 Unable to Load Data

If the expense or income data does not load correctly, please ensure you have a stable internet connection and try refreshing the page. If the issue persists, clear your browser cache or use a different browser.

## 3.2 Missing or Incorrect Data

Ensure that all fields are correctly filled in when adding an expense or income. Missing information can prevent the data from being saved properly.

## 3.3 Export Failures

If the export feature does not work, check if you have the correct permissions to download data. Try again after ensuring that the necessary permissions are granted in your browser.